

# National Travel & Tourism Strategy

Task Force on Travel & Competitiveness



2012

Preview Copy

**Contents**

<u>I.</u>	<u>Executive Summary</u> .....	1
<u>II.</u>	<u>Situation Analysis</u> .....	4
<u>III.</u>	<u>Promoting the United States</u> .....	13
<u>IV.</u>	<u>Enabling and Enhancing Travel and Tourism to and within the United States</u> .....	16
<u>V.</u>	<u>Providing World-Class Customer Service and Visitor Experience</u> .....	21
<u>VI.</u>	<u>Coordinating across Government</u> .....	24
<u>VII.</u>	<u>Conducting Research and Measuring Results</u> .....	26
<u>VIII.</u>	<u>Conclusion</u> .....	28

## Letter to the President from Co-Chairs of the Task Force on Travel and Competitiveness

*Dear Mr. President:*

*On January 19, 2012, you signed an Executive Order establishing a new Task Force on Travel and Competitiveness, which you charged with developing a National Travel and Tourism Strategy. As co-chairs of the Task Force, we have worked to develop the attached set of policies, actions, and recommendations to promote domestic and international travel throughout the United States, and each agency that you called on in your Executive Order has developed straightforward, common-sense approaches to reducing barriers, creating opportunities, and improving customer service.*

*The Task Force's comprehensive government-wide strategy will encourage travelers to choose America as the world's premier tourism destination. It will better facilitate entering into and traveling across the United States, and foster greater cooperation with the private sector to provide a world-class U.S. travel experience that will encourage visitors to extend their stays and return to see more.*

*Our goal is simple yet bold: increase American jobs by attracting and welcoming 100 million international visitors, who we estimate will spend \$250 billion, annually by the end of 2021. We will also encourage Americans to travel within the United States and its territories to see all that our country has to offer.*

*Thank you for the opportunity to chair this Task Force. We are energized that you have challenged us to do more and to do better. The promise of meaningful job creation is within our reach, and we are already working together to achieve the goals outlined in this National Strategy.*

*Sincerely,*

*John Bryson, Secretary of Commerce*

*Ken Salazar, Secretary of the Interior*

*On behalf of the Task Force on Travel and Competitiveness:*

*The U.S. Department of Commerce  
The U.S. Department of the Interior  
The U.S. Department of State  
The U.S. Department of Treasury  
The U.S. Department of Agriculture  
The U.S. Department of Labor*

*The U.S. Department of Transportation  
The U.S. Department of Homeland Security  
The U.S. Army Corps of Engineers  
The Office of the U.S. Trade Representative  
The Export-Import Bank of the United States  
The U.S. Small Business Administration*

### I. EXECUTIVE SUMMARY

Travel and tourism are critical to the American economy. This growing industry offers significant potential for job creation across all regions of the country. Federal policies on matters ranging from national security to transportation and from trade to natural resources management affect travel and tourism, and its potential for growth. In a global economy, a range of businesses depend on travel and tourism policies to enable clients, customers, and colleagues to conduct business in the United States. In addition, ensuring that international visitors have a positive experience in America is an essential component of our public diplomacy and U.S. foreign policy.

In 2011 the travel and tourism industry generated \$1.2 trillion and supported 7.6 million jobs.<sup>1</sup> Real travel and tourism spending grew 3.5 percent in 2011,<sup>2</sup> outpacing the 1.7 percent growth rate for the economy as a whole.<sup>3</sup>

As a travel destination, no other nation can compete with the diversity of experiences found across the United States and its territories, with its public lands, waters, and iconic cultural and historic sites. In fact, the United States leads the world in revenues from international travel and tourism and ranks second in the number of international visitors. In 2011, 62 million international visitors came to the United States and spent a record \$153 billion on U.S. travel- and tourism-related goods and services, which are counted as U.S. exports.<sup>4</sup>

While the United States set records for international visitation in four of the last five years,<sup>5</sup> the global travel market has become increasingly competitive. Other countries actively market themselves, and new destinations are aggressively competing for market share. This year, the United States will launch a promotion campaign to increase international travel to our country through the Corporation for Travel Promotion, doing business as Brand USA.

---

<sup>1</sup> Department of Commerce, International Trade Administration (ITA), Office of Travel and Tourism Industries (OTTI), Fast Facts: United States Travel and Tourism Industry, 2011, available at [http://www.tinet.ita.doc.gov/outreachpages/download\\_data\\_table/Fast\\_Facts.pdf](http://www.tinet.ita.doc.gov/outreachpages/download_data_table/Fast_Facts.pdf).

<sup>2</sup> Department of Commerce, Bureau of Economic Analysis (BEA), News Release, March 21, 2012, available at <http://www.bea.gov/newsreleases/industry/tourism/2012/pdf/tour411.pdf>.

<sup>3</sup> Department of Commerce, BEA, National Income Accounts, April 2012, available at <http://www.bea.gov/newsreleases/industry/gdpindustry/gdpindhilights.pdf>.

<sup>4</sup> Travel exports represent the sum of *travel* and *passenger fare* receipts. *Travel* is the money spent on the purchase of goods and services by international visitors in the United States for business or personal reasons. These goods and services include food, lodging, recreation, gifts, entertainment, local transportation or other incidental spending. *Passenger fares* are the money received by U.S. air carriers from international visitors for travel between the United States and foreign countries and the fares received by U.S. vessel operators on cruise vessels. Department of Commerce, ITA, OTTI, Fast Facts: United States Travel and Tourism Industry, 2011, available at [http://www.tinet.ita.doc.gov/outreachpages/download\\_data\\_table/Fast\\_Facts.pdf](http://www.tinet.ita.doc.gov/outreachpages/download_data_table/Fast_Facts.pdf).

<sup>5</sup> Department of Commerce, ITA, OTTI, International Visitation to the United States: A Statistical Summary of U.S. Visitation (2011) available at [http://tinnet.ita.doc.gov/outreachpages/download\\_data\\_table/2011\\_Visitation\\_Report.pdf](http://tinnet.ita.doc.gov/outreachpages/download_data_table/2011_Visitation_Report.pdf).

## United States National Travel and Tourism Strategy

The U.S. government plays a unique role in creating a positive environment for private sector job growth in the travel and tourism industry, while protecting resources, travelers, and the public. International travelers require services when they apply for a U.S. visa, enter the country, visit federally managed sites, and navigate our transportation systems. The quality of these services will enhance or detract from the image of the United States as a travel destination and impact our ability to compete globally.

This National Travel and Tourism Strategy establishes an overarching goal of increasing American jobs by attracting and welcoming 100 million international visitors, who we estimate will spend \$250 billion, annually by the end of 2021. We will also encourage Americans to travel within the United States and its territories to see all that our country has to offer.

The United States can achieve this goal by:

- **Promoting the United States.** Federal agencies will take action to capitalize on the growing demand for travel and tourism in the United States by creating a positive and welcoming message for international visitors. The government will expand its promotional efforts to market the United States as a travel destination by providing senior Administration spokespeople and content on the diversity of attractive tourist sites within Federal jurisdiction. Using our authorities, messengers, and outlets – including agency websites, social media tools, embassies and consulates, and high-profile officials – the government will communicate the tourism opportunities in America to a larger domestic and international audience. We will coordinate with Brand USA in its mission to promote international travel to the United States. We will promote new opportunities to access Federal data and use technology to enhance and tailor information for visitors to identify destinations and plan trips to and within the United States.
- **Enabling and enhancing travel and tourism to and within the United States.** Federal agencies will take specific actions with the aim of: reducing institutional barriers to the free flow of trade in travel services; expanding the Visa Waiver Program (VWP); enhancing U.S. visa processing to meet the expected growth in demand; expanding trusted traveler programs and expedited screening initiatives; and improving the processes for arrival and aviation security screening, while ensuring the security of our borders and the safety of the traveling public. Federal agencies will continue to innovate and make improvements in processes, technologies, staffing, and infrastructure to streamline the visa application process and entry into the country through border crossings and ports of entry, for legitimate travelers. Wider deployment of new airport security screening technologies and investments in aviation infrastructure will further improve the passenger screening and overall travel experience for domestic and international air travelers. In addition, the government will continue to use its discretionary grant programs to make strategic investments in transportation infrastructure to enable safer and more efficient movement between destinations throughout the country.
- **Providing world-class customer service and visitor experience.** The government will take steps to ensure a high quality experience for travelers that will inspire repeat visitation and positive word-of-mouth advertising. The government will support workforce development initiatives and small businesses to ensure that Federal and



## United States National Travel and Tourism Strategy

private sector workers are equipped to effectively serve and maximize business opportunities with a diverse audience of visitors. By also piloting innovative ways to use technology to provide information and interpret content for non-English speaking visitors and taking advantage of technologies like smartphones and translation applications, we will provide fresh, dynamic content in the most in-demand languages, and will be able to reassess and respond continually to new language and information needs.

- **Coordinating across government.** Federal agencies must work together and with public and private partners to maximize the potential of travel and tourism to create jobs. The Federal government will continue to prioritize its support for travel and tourism, and will take steps to better coordinate Federal policies and programs by reinvigorating the Tourism Policy Council, by engaging more deliberately with partners, and by encouraging coordinated Federal participation in public-private tourism collaborations. In addition, the Department of Commerce will establish a national travel and tourism office to provide leadership and focus within the Federal government.
- **Conducting research and measuring results.** Public and private parties need up-to-date information to make smart decisions about policies and investments. The Federal government will work with the travel and tourism industry and academic researchers to conduct high quality research on travel and tourism issues and trends to inform public and private decision-making. Performance metrics and accountability measures will be used to ensure continual progress on the important goals and strategies outlined in this National Strategy.

To ensure success, Federal agencies must continue to make travel and tourism a priority, coordinate efforts with one another, and work with partners in a collaborative effort to meet future demand. These efforts will significantly strengthen economic opportunity and job creation in the travel and tourism industry. Upon delivery of this National Travel and Tourism Strategy, Federal agencies will immediately begin to develop detailed implementation plans to realize the promise of these recommendations.

## II. SITUATION ANALYSIS

### *Travel and Tourism and the U.S. Economy*

The leisure and hospitality sector is the fifth largest employer in the United States and one of six priority sectors likely to drive domestic employment growth over the next 10 years.<sup>6</sup> The leisure and hospitality sector – which includes accommodations, food services, arts, entertainment, and recreation – could add between 2.1 million and 3.3 million jobs during this period<sup>7</sup> with high growth in consumer spending and gains in the U.S. share of global tourism. Travel and tourism is a significant contributor to the leisure and hospitality sector.<sup>8</sup>

In 2011, real travel and tourism spending (adjusted for changes in pricing) grew 3.5 percent,<sup>9</sup> outpacing the 1.7 percent growth rate of the economy as a whole.<sup>10</sup> U.S. and international travelers spent \$807 billion, generating \$1.2 trillion in total economic activity and supporting 7.6 million American jobs.<sup>11</sup> The United States received more than 11 percent of global spending on travel and tourism, with 62 million international visitors who generated travel and tourism exports of \$153 billion, lowering the trade deficit by \$42.8 billion.<sup>12</sup>

Business travel accounts for approximately 22 percent of overseas travel to the United States.<sup>13</sup> Business travelers come to the United States to participate in meetings, conventions, and trade shows; to explore investment opportunities; and to purchase goods and services across the full spectrum of manufacturing and service sectors.

Domestic spending on travel within the United States in 2011 was more than \$654 billion. Of the total 7.6 million jobs supported by travel and tourism, 6.5 million are supported by domestic consumers.<sup>14</sup> In turn, U.S. residents spent more than \$110 billion abroad in 2011 on travel and tourism-related goods and services, an increase of 7 percent compared to 2010.<sup>15</sup>

---

<sup>6</sup> McKinsey Global Institute, “An economy that works: Job creation and America’s future”, June 2011, available at [http://www.mckinsey.com/Insights/MGI/Research/Labor\\_Markets/An\\_economy\\_that\\_works\\_for\\_US\\_job\\_creation](http://www.mckinsey.com/Insights/MGI/Research/Labor_Markets/An_economy_that_works_for_US_job_creation).

<sup>7</sup> Ibid.

<sup>8</sup> Travel and tourism activity includes non-immigrant travel for leisure, business, education, medical, and other purposes, and engages a range of industries from lodging, food, retail and transportation, to suppliers and support services throughout the supply chain such as food wholesalers, construction, and others. The sector comprises large, medium, and small enterprises and is geographically dispersed across all regions and territories.

<sup>9</sup> Department of Commerce, BEA, News Release, March 21, 2012, available at <http://www.bea.gov/newsreleases/industry/tourism/2012/pdf/tour411.pdf>.

<sup>10</sup> Department of Commerce, BEA, National Income Accounts, April 2012, available at <http://www.bea.gov/newsreleases/industry/gdpindustry/gdpindhightlights.pdf>.

<sup>11</sup> Department of Commerce, ITA, OTTI, Fast Facts: United States Travel and Tourism Industry, 2011, available at [http://www.tinet.ita.doc.gov/outreachpages/download\\_data\\_table/Fast\\_Facts.pdf](http://www.tinet.ita.doc.gov/outreachpages/download_data_table/Fast_Facts.pdf).

<sup>12</sup> Ibid.

<sup>13</sup> Department of Commerce, ITA, OTTI, Profile of Overseas Travelers to the United States: 2010 Inbound available at [http://tinnet.ita.doc.gov/outreachpages/download\\_data\\_table/2010\\_Overseas\\_Visitor\\_Profile.pdf](http://tinnet.ita.doc.gov/outreachpages/download_data_table/2010_Overseas_Visitor_Profile.pdf).

<sup>14</sup> Department of Commerce, ITA, OTTI, Fast Facts: United States Travel and Tourism Industry, 2011, available at [http://www.tinet.ita.doc.gov/outreachpages/download\\_data\\_table/Fast\\_Facts.pdf](http://www.tinet.ita.doc.gov/outreachpages/download_data_table/Fast_Facts.pdf).

<sup>15</sup> Ibid.

### *Travel and Tourism and Federal Properties*

The Federal government owns and manages some of America's most iconic symbols. From the Statue of Liberty to the Grand Canyon, America's public lands, waters, and destinations play an outsized role in supporting the travel and tourism economy. Recreation in national parks, wildlife refuges, forests, marine sanctuaries, and other federally managed lands and waters contributed more than \$62 billion and 612,000 jobs to the U.S. economy in 2010, the most recent year for which data is available.<sup>16</sup>

National parks and Federal lands and waters are located across the entire United States, including many rural areas. Increasing international and domestic travel to Federal lands, waters, and surrounding towns can help stimulate the economy and create jobs in both urban and rural America. Each year, millions of international tourists visit U.S. public lands and small towns, spending money at local businesses that provide lodging, dining, retail and entertainment. Rural America plays a particularly important role in the national tourism economy by attracting and retaining tourists for longer visits. By creating and maintaining jobs in rural America, travel and tourism can support the work of the White House Rural Council, which was established by an Executive Order of President Obama in June 2011, to create jobs and foster economic development in Rural America.

### *The International and Domestic Markets*

From 2000 to 2010, the U.S. market share of spending by international travelers fell from 17 percent to 11 percent, a more than 30 percent decrease in our share of the global market.<sup>17</sup> Other traditional tourism destinations such as France, Spain, Italy, Germany, the United Kingdom, and Canada also lost market share during this period. Asian markets and emerging destinations like Hungary, Ukraine, Poland, and Morocco increased their market share dramatically.<sup>18</sup>

Many factors have contributed to the decline in U.S. market share, including the growth of intra-regional travel (particularly in Asia), the increasing popularity and accessibility of new global destinations, the advent of low-cost regional airlines encouraging travelers to stay closer to home, currency fluctuations, and the absence of a national promotion strategy for the United States in this increasingly competitive environment. Additionally, security requirements instituted in the aftermath of the September 11, 2001, attacks, although effective at ensuring the safety of travelers and the nation, may have contributed to an impression among some that the United States does not welcome international visitors.

---

<sup>16</sup> Department of the Interior, 2011, The Department of the Interior's Economic Contributions, available at <http://www.doi.gov/ppa/upload/DOI-Econ-Report-6-21-2011.pdf> and Forest Service, National Visitor Use Monitoring Results, available at [http://www.fs.fed.us/recreation/programs/nvum/nvum\\_national\\_summary\\_fy2009.pdf](http://www.fs.fed.us/recreation/programs/nvum/nvum_national_summary_fy2009.pdf).

<sup>17</sup> United Nations World Tourism Organization, World Trade Barometer V. 10, March 2012.

<sup>18</sup> Ibid.



## United States National Travel and Tourism Strategy

Currently, more than 60 percent of visitors to the United States do not require a visa.<sup>19</sup> All other international travelers must obtain a visa from a U.S. embassy or consulate to travel to the United States. Twenty-four percent to 29 percent of annual international travelers enter the United States with multiple-entry visas issued in prior years, while approximately 11 percent must obtain new visas.

The composition of international travelers to the United States is changing at an accelerating rate. The number of overseas travelers from countries whose nationals require U.S. visas increased 34 percent from 2006 to 2011 and is forecasted to increase by 53 percent from 2011 to 2016.<sup>20</sup> By comparison over the same time periods, the number of overseas travelers from countries whose nationals do not require visas increased only 26 percent and is forecasted to increase by 17 percent.<sup>21</sup> In the next five years, countries whose nationals require visas are expected to have the highest growth rates in travel to the United States, including China (+198 percent), Brazil (+70 percent), and Argentina (+46 percent).

Our neighbors, Canada and Mexico, currently are the top two markets for international travelers to the United States. In 2011, 21 million Canadian nationals visited the United States, followed by Mexico with 13 million visitors, accounting for exports of \$24 billion and \$9 billion, respectively.<sup>22</sup> Mexico represents a near-term opportunity for increasing travel to the United States because of its growing middle class and strong cultural ties.

While in the United States, international travelers engage in a variety of activities, visiting urban areas as well as small towns. A significant number of international travelers seek out nature- and culture-based experiences, such as visiting historic sites (40 percent of overseas travelers), cultural sites (23 percent) and national parks (20 percent).<sup>23</sup> One-tenth of all visitors surveyed at national parks since 2002 were of international origin.<sup>24</sup>

Nature-based, culture-based, heritage and outdoor adventure travel represent a significant segment of the outbound tourism market as well. In 2010, more than 21 million U.S. travelers visited other countries for leisure or to visit friends and relatives. Of these, more than one half

---

<sup>19</sup> Eligible nationals of certain countries may travel to the United States visa free, pursuant to various statutes and regulations. For example nationals of Canada and nationals of countries in the Visa Waiver Program, authorized under section 217 of the Immigration and Nationality Act, do not require visas to enter the United States. The following are the 36 countries included in the Visa Waiver Program: Andorra, Australia, Austria, Belgium, Brunei, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Japan, Latvia, Liechtenstein, Lithuania, Luxembourg, Malta, Monaco, the Netherlands, New Zealand, Norway, Portugal, San Marino, Singapore, Slovakia, Slovenia, South Korea, Spain, Sweden, Switzerland, and the United Kingdom.

<sup>20</sup> Department of Commerce, ITA, OTTI, Forecast of International Travel, available at <http://tinet.ita.doc.gov/view/f-2000-99-001/index.html>.

<sup>21</sup> Ibid.

<sup>22</sup> Department of Commerce, ITA, OTTI, 2011 Top 10 International Markets available at <http://tinet.ita.doc.gov/pdf/2011-Top-10-Markets.pdf>.

<sup>23</sup> U.S. Department of Commerce, ITA, OTTI, Profile of Overseas Travelers to The United States: 2010 Inbound (excluding data on travelers from Canada and Mexico), available at [http://www.tinet.ita.doc.gov/outreachpages/download\\_data\\_table/2010\\_Overseas\\_Visitor\\_Profile.pdf](http://www.tinet.ita.doc.gov/outreachpages/download_data_table/2010_Overseas_Visitor_Profile.pdf).

<sup>24</sup> Data from 72 visitor studies conducted between 2002 and 2011, originated from the University of Idaho Park Studies Unit, Visitor Services Project. Database creation is supported by funding from the National Park Service, Social Science Division, and from individual National Park Service units.

## United States National Travel and Tourism Strategy

engaged in nature, culture or heritage tourism experiences, including visits to historic places and cultural and ethnic heritage sites, visits to national parks, camping, hiking, and visits to environmental or ecological sites.<sup>25</sup>

### *The Opportunity*

The United States can support economic growth and job creation by better leveraging the travel and tourism industry. This National Strategy proposes that Federal agencies work together and with the private sector to meet the goal of increasing American jobs by attracting and welcoming 100 million international visitors, who we estimate will spend \$250 billion, annually by the end of 2021. We will also encourage Americans to travel within the United States and its territories to see all that our country has to offer. This National Strategy recognizes that the role of government is to create the conditions for growth by ensuring that government services meet demand and our resources are protected for future generations.

### *Promoting the United States*

A significant competitive advantage of the United States as a tourism destination lies in the diversity of experiences we offer, ranging from urban destinations and small-town America to the many unique regional cultures found throughout the United States and its territories. Popular culture – including music, film and television, and theme park experiences – is also a significant selling point. So too are our iconic destinations, from well-known attractions like the Statue of Liberty and Florida Keys National Marine Sanctuary, to off-the-beaten-path gems like Mount St. Helens' National Volcanic Monument and Desert National Wildlife Refuge, many of which can be found in close proximity to major transportation gateways, including the 10 U.S. cities most visited by international travelers.

Unlike many other nations whose governments aggressively promote travel and tourism to their countries, the Federal government of the United States has not had a sustained international promotion campaign since the closing of the U.S. Travel and Tourism Administration in 1996. Likewise, while many state, tribal, territorial and local governments promote travel to their respective destinations, no coordinated campaign exists to promote U.S. destinations to American visitors, which might encourage them to travel more at home.

In part to remedy the lack of a national tourism promotion campaign, the Travel Promotion Act of 2009<sup>26</sup> established the nonprofit Corporation for Travel Promotion (now doing business as Brand USA) to promote international travel and tourism to the United States.<sup>27</sup> Brand USA

---

<sup>25</sup> Department of Commerce, ITA, OTTI, Profile of U.S. Resident Travelers Visiting Overseas Destinations: 2010 Outbound, available at [http://tinet.ita.doc.gov/outreachpages/download\\_data\\_table/2010\\_Outbound\\_Profile.pdf](http://tinet.ita.doc.gov/outreachpages/download_data_table/2010_Outbound_Profile.pdf).

<sup>26</sup> Section 9 of Public Law 111-145, 22 USC 2131.

<sup>27</sup> Brand USA is funded in part by fees collected from international visitors from visa waiver countries. From 2012 to 2015, up to \$100 million per year from these fees will be disbursed to Brand USA by the Federal government, if appropriate non-Federal matching contributions are obtained, both in cash and in kind (in Fiscal Year 2012, a 1:2 match of non-Federal funds to public funds is required, after that a 1:1 match is required). After 2015, the Travel Promotion Act does not provide for federal funding of Brand USA. The Federal government approves the annual objectives of Brand USA but has no authority to approve Brand USA's annual marketing plan or budget.

## United States National Travel and Tourism Strategy

recently launched its first marketing effort to promote the United States in international markets, including establishment of the DiscoverAmerica.com website. In May 2012, promotional efforts will begin in Canada, the United Kingdom, and Japan. A second wave of promotional efforts is planned for South Korea and Brazil later this year. In the future, Brand USA plans to add campaigns in other countries, including Australia, India, Mexico, China, Argentina, and several European countries.

Although the United States has not had a coordinated, Federal international promotion campaign, many individual agencies and departments have provided visitor information and planning tools for travelers. When traveling abroad or meeting with representatives of foreign countries, senior U.S. government officials and diplomatic personnel often promote the United States as a travel destination. The Department of State's public affairs and public diplomacy bureaus offer communications materials for translation and use throughout the world, multiple social media outlets, and exchange programs with target communities. Specialists in the Department of Commerce's U.S. and Foreign Commercial Service's offices in the United States and around the world help U.S. destinations and companies understand global markets and attract more travelers to the United States. The Foreign Commercial Service also promotes U.S. destinations at international travel and tourism tradeshow and furthers awareness of U.S. travel destinations with foreign media. Additionally, Foreign Commercial Service offices and the Department of State work closely with American Chambers of Commerce and Visit USA Committees to promote the United States to international visitors.

Travel agencies, Internet search tools, and airlines are important sources of trip planning information for many international travelers. Many Federal agencies maintain websites that include trip planning resources. Given the importance of personal computers and mobile devices for trip planning, this area in particular is ripe for better government coordination.

### *Enabling and Enhancing Travel to and within the United States*

By identifying and addressing institutional barriers to travel and tourism in the United States, Federal agencies are helping to ensure the free flow of trade in travel services. Examples of restrictions in this area include limitations by foreign governments on: airline entry, service levels, and the cities that can be served; the sale of outbound travel and packaged group travel; the use of enabling technologies; and the nationality of tour operators.

Recent successes by Federal agencies in removing barriers to U.S. travel include open-skies air transport agreements (open-skies agreements) and the memoranda of understanding with China that opened the market for the sale of group leisure travel from China to the United States. Open-skies agreements liberalize air services between foreign countries and the United States. To date, the United States has negotiated open-skies agreements with 105 partner countries, which gives visitors greatly expanded travel options by allowing airlines, rather than governments, to determine where and how often to fly. At the same time that barriers to trade in travel services are being removed, increasing prosperity is generating additional demand.

## United States National Travel and Tourism Strategy

The United States received record numbers of arrivals during four of the last five years.<sup>28</sup> The U.S. government has been challenged to meet this increased demand for services within existing resources and legislative constraints. From interviewing visa applicants to processing travelers at U.S. ports of entry and screening passengers in our airports, agencies are reengineering processes and redeploying resources in new and innovative ways to ensure that we can facilitate a growing number of travelers in such a way that enhances, not compromises, our national security.

Consular officers and support staff protect our borders and facilitate legitimate travel by adjudicating millions of U.S. visa applications each year at 222 visa-processing embassies and consulates worldwide. In FY 2011, the State Department processed 1.1 million more visa applications than in the previous year.<sup>29</sup> More than one million visa applications were processed in China and more than 800,000 were processed in Brazil – increases of 34 percent and 42 percent over the previous year, respectively.<sup>30</sup> This growth is continuing. In the first six months of FY 2012, the State Department processed 46 percent more visa applications in China and 59 percent more in Brazil than during the same time period in FY 2011.<sup>31</sup>

Staffing increases and internal efficiency measures have nearly eliminated interview backlogs in China and have significantly reduced the backlog of cases in Brazil, where wait times have come down well below the previous highs of more than 100 days, to below 10 days at many posts. Using visa fees, the State Department is expanding interview capacity by adding new adjudication windows in China and Brazil. The State Department is increasing visa adjudication staff by 50 percent in China and more than 100 percent in Brazil in 2012. These additional positions could increase capacity by more than 1.5 million adjudications across the two missions.<sup>32</sup> The State Department is also planning to open new consulates in Porto Alegre and Belo Horizonte, Brazil, and to expand its post in Wuhan, China, to include visa services.

On arrival, all persons are subject to inspection by U.S. Customs and Border Protection (CBP) Officers at ports of entry. CBP closely monitors wait times for international travelers and strives to process arriving travelers, regardless of port environment, as efficiently as possible while maintaining the highest levels of security. However, since the creation of CBP in 2003, CBP's mission requirements have expanded to meet changing security objectives and accommodate fluctuations in global trade and international travel. CBP faces several challenges in providing adequate staffing to meet mission requirements, including relying on fluctuating user fee

---

<sup>28</sup>Department of Commerce, ITA, OTTI, International Visitation to the United States: A Statistical Summary of U.S. Visitation (2011) available at

[http://tinnet.ita.doc.gov/outreachpages/download\\_data\\_table/2011\\_Visitation\\_Report.pdf](http://tinnet.ita.doc.gov/outreachpages/download_data_table/2011_Visitation_Report.pdf).

Department of Commerce, ITA, OTTI, International Visitation to the United States: A Statistical Summary of U.S. Visitation (2011) available at

[http://tinnet.ita.doc.gov/outreachpages/download\\_data\\_table/2011\\_Visitation\\_Report.pdf](http://tinnet.ita.doc.gov/outreachpages/download_data_table/2011_Visitation_Report.pdf).

<sup>29</sup> “State Department Supports Global Travel Growth”, Department of States, available at [http://travel.state.gov/visa/questions/news/news\\_5609.html](http://travel.state.gov/visa/questions/news/news_5609.html).

<sup>30</sup> “State Department Deploys Additional Staff to Process Record U.S. Visa Demand”, Department of State, December 21, 2011 available at <http://www.state.gov/r/pa/prs/ps/2011/12/179358.htm>.

<sup>31</sup> “State Department Processing Visas at Record Pace: More Visitors from China and Brazil Mean More American Jobs”, Department of States, April 18, 2012 available at <http://www.state.gov/r/pa/prs/ps/2012/04/188076.htm>.

<sup>32</sup> “The Growing Demand for U.S. Visas in China and Brazil”, Department of State, November 8, 2011 available at <http://www.state.gov/r/pa/prs/ps/2011/11/176781.htm>.

collections that are dependent on passenger volume for more than 35 percent of the funding for its frontline CBP officers (CBPOs).

Despite challenges, CBP has managed to keep the wait times of 94.7 percent of arriving passengers at the ten busiest international airports to less than one hour and has kept the national average wait time for passenger processing in airports at 22 minutes.<sup>33</sup> However, limited staffing as well as external factors – such as inclement weather or delayed flights – can lead to high peak wait times, especially during busy summer travel months. At peak times in 2011, maximum wait times sometimes exceeded two hours at Los Angeles International Airport and John F. Kennedy International airport in New York City.<sup>34</sup> As this National Strategy is implemented and international travel to the U.S. increases, CBP will continue to optimize resources at the ports of entry. This includes continuing to use a workload staffing model to accurately determine staffing requirements, seeking alternative sources of funding to finance additional personnel, and continuing to seek process improvements to lessen the need for additional staffing.

Investments in risk-based security programs and policies, personnel, technology and intelligence are improving the effectiveness and efficiency of the inspection process. At land borders, under the Western Hemisphere Travel Initiative, the government has leveraged Radio Frequency Identification (RFID) technology to increase the speed of database checks for passengers crossing the border. The Model Ports program, which was designed to create a more welcoming atmosphere in our country's 20 busiest airports, is standardizing and streamlining the entry process. The travelers processed by CBP at these airports represent 73 percent of air travelers to the United States.

Trusted traveler programs, which currently serve 1.3 million members, allow expedited clearance for pre-approved, low-risk travelers upon arrival in and travel through the United States. As of May 2, 2012, more than 998,000 trusted travelers have Global Entry benefits, with more than 300,000 individuals directly enrolled in Global Entry. Global Entry allows travelers arriving in the United States by air to use 166 automated kiosks at 25 airports, as well as seven pre-clearance sites. The use of kiosks reduces average processing times to less than one minute, which is up to a 70 percent savings in processing time. Global Entry has freed more than 42,400 inspection hours, which CBP re-allocated to reduce regular passenger queues.

CBP continues efforts to expand enrollment in trusted traveler programs internationally by expanding program eligibility to partner countries. Global Entry is available to U.S. citizens and U.S. Lawful Permanent Residents, Canadian citizens and permanent residents, Dutch citizens enrolled in the Privium program, Mexican citizens, and citizens of the United Kingdom, Germany, and Qatar through limited pilot programs. In addition, CBP has entered into joint arrangements with South Korea and Panama to allow their qualifying citizens and permanent residents to participate in Global Entry. NEXUS, a trusted traveler program co-developed with

---

<sup>33</sup> U.S. Customs and Border Protection, Testimony of Acting Deputy Commissioner Thomas Winkowski before the Senate Appropriations Committee, Subcommittee on Homeland Security, March 21, 2012, available at [http://www.cbp.gov/linkhandler/cgov/newsroom/congressional\\_test/ti\\_testimony.ctt/ti\\_testimony.pdf](http://www.cbp.gov/linkhandler/cgov/newsroom/congressional_test/ti_testimony.ctt/ti_testimony.pdf).

<sup>34</sup> U.S. Customs and Border Protection publishes wait times for 23 international airports online at <http://apps.cbp.gov/awt/>.



Canada, provides more than 625,000 pre-approved, low-risk members with expedited CBP processing at land, maritime, and air border crossings between the United States and Canada. Secure Electronic Network for Travelers Rapid Inspection (SENTRI) provides more than 148,000 approved travelers with expedited processing at the U.S.-Mexico border. Other wait-time mitigation initiatives to help address peak arrival times and summer traffic congestion at airports include “Express Connection” and “One-Stop.” These programs greatly reduce missed connections, increase passenger throughput, and enhance the arrival processing experience.

Each day the Transportation Security Administration (TSA) screens about 1.7 million passengers and their baggage before they board commercial aircraft.<sup>35</sup> In October 2011, TSA launched its own expedited screening initiative called TSA Pre✓™. Through this initiative, U.S. citizens who are qualifying frequent fliers of certain commercial airlines or who are members of CBP’s trusted traveler programs, flying domestically, may be eligible for expedited screening at select checkpoints. In March 2012, TSA also began a pilot at Ronald Reagan Washington National Airport for expedited screening of active duty members of the U.S. military. By the end of 2012, TSA plans to have TSA Pre✓™ operating at many of the nation’s busiest airports. Passengers enrolled through a participating commercial carrier may utilize TSA Pre✓™ when flying with their sponsoring air carrier, while CBP trusted traveler members are eligible for TSA Pre✓™ when flying any participating airline.

In the fall of 2011, TSA tested and successfully implemented modified screening procedures for passengers age 12 and younger and, in March 2012, TSA began testing modified screening procedures for passengers 75 and older. With regard to wait times, passengers can currently use the “MyTSA” mobile application for the latest information. TSA is currently testing wait time technologies in a laboratory environment in order to identify a solution for automating the wait time collection process.

To facilitate transportation to and within the United States, Federal agencies have worked to improve transportation infrastructure and travel and tourism safety measures in particular. The Federal Motor Carrier Safety Administration (FMCSA) has developed posters, safety pamphlets, and audio CDs of a pre-trip safety announcement translated into six foreign languages, which are available from its website and have been distributed to motorcoach carriers. In addition, the FMCSA has developed safety checklists in seven foreign languages providing consumers with information about how to choose a commercial bus company. Other programs, such as the Federal Lands Highway Program and the Transit in the Parks Program, enable Federal, state, tribal, and local partners to invest in transportation infrastructure to enhance tourism at Federal lands, waters, and shores.

To improve air travel, the government has begun investing in the Next Generation Air Transportation System, or NextGen.<sup>36</sup> NextGen is the improvement and modernization of the invisible infrastructure of our national airspace. NextGen is changing the way we fly by moving

---

<sup>35</sup> “What is TSA?”, Transportation Security Administration, U.S. Department of Homeland Security, [http://www.tsa.gov/who\\_we\\_are/what\\_is\\_tsa.shtm](http://www.tsa.gov/who_we_are/what_is_tsa.shtm).

<sup>36</sup> Federal Aviation Administration, NextGen Implementation Plan, March 2012, available at [http://www.faa.gov/nextgen/implementation/media/NextGen\\_Implementation\\_Plan\\_2012.pdf](http://www.faa.gov/nextgen/implementation/media/NextGen_Implementation_Plan_2012.pdf).



from ground-based radar to satellite technology. By creating more precise and direct routes, NextGen will deliver more on-time and fuel-efficient flights, and continue to ensure the safest air transportation system in the world. The Federal Aviation Administration's (FAA) latest estimates show that by 2020, NextGen improvements will reduce delays by 38 percent and save an estimated 1.4 billion gallons of fuel.<sup>37</sup>

### *Providing world-class customer service and visitor experience*

The Federal government can influence many variables that affect the overall quality of a visitor's travels in the United States. Many of our most valuable tourist destinations are managed by Federal agencies and staffed by their employees. For instance, 21 World Heritage Sites<sup>38</sup> are located in the United States. This designation is given by the United Nations Educational, Scientific and Cultural Organization to signify sites around the world that are of outstanding universal value to humanity. As stewards of these valuable tourism assets, the government has a responsibility to ensure that they are managed as world-class tourist destinations. A diverse audience of visitors expects positive personal interactions with staff, well-maintained facilities, and engaging and accessible language interpretation. Federal land and water management agencies do not currently coordinate services across agencies for international visitors. While some national parks, refuges, monuments, seashores, marine sanctuaries, and forests offer services tailored to international travelers – such as visitor resources in plain English or foreign languages – most do not. The new Federal Interagency Council on Recreation (FICOR), established under this Administration's *America's Great Outdoors* initiative, has begun to develop coordinated strategies for improving the visitor experience at federally-managed sites.

The quality and availability of service that travelers receive from the businesses they patronize affects the overall visitor experience. Through varied resource partners, including its network of Small Business Development Centers and SCORE mentors, the Small Business Administration (SBA) counseled more than 11,000 travel- and tourism-related small businesses in FY 2011 on creating business plans, conducting financial and auditing analysis, and building marketing strategies, among other services, so that these businesses can better serve customers, grow faster and hire more quickly. Because travel and tourism supports such a wide range of economic activity, travel and tourism related businesses constituted almost 12 percent of SBA's business loan guarantee programs' volume by dollar value in FY 2011, more than \$3 billion.<sup>39</sup> In addition, small businesses in travel and tourism-related industries were awarded \$1.5 billion in Federal contracts in FY 2011.<sup>40</sup>

---

<sup>37</sup> Federal Aviation Administration, NextGen Implementation Plan, March 2012, available at [http://www.faa.gov/nextgen/implementation/media/NextGen\\_Implementation\\_Plan\\_2012.pdf](http://www.faa.gov/nextgen/implementation/media/NextGen_Implementation_Plan_2012.pdf).

<sup>38</sup> A "World Heritage Site" is a designation given by the United Nations Educational, Scientific and Cultural Organization (UNESCO) pursuant to the Convention Concerning the Protection of the World Cultural and Natural Heritage. This special designation is reserved for places on Earth that are of outstanding universal value to humanity and as such, have been inscribed on the World Heritage List to be protected for future generations to appreciate and enjoy. World Heritage Sites include places as diverse and unique as the Pyramids of Egypt, the Great Barrier Reef in Australia, Galápagos Islands in Ecuador, the Taj Mahal in India, the Grand Canyon in the USA, and the Acropolis in Greece. There are 911 natural and cultural places inscribed on the World Heritage List to date.

<sup>39</sup> SBA analysis of loan data from the "Executive Information System" (EIS) database.

<sup>40</sup> SBA analysis of contracting data from the "Federal Procurement Data System – Next Generation" database.

A well-trained workforce is required to meet the needs of the travel and tourism industry. The government has invested in a number of tools to support the public workforce system across all major economic sectors, including travel and tourism, with a focus on promoting innovation and the sharing of best practices. Some of the tools developed by grants focused on the hospitality sector are available online.<sup>41</sup> The Federal government creates opportunities for workforce development efforts through the Workforce Investment Act of 1998 (WIA).<sup>42</sup> In FY 2012, \$4.8 billion was appropriated for training and employment services to adults, displaced workers, and disadvantaged young people across all industry sectors under Title I of WIA.

### *Coordinating Across Government*

While the Federal government spends significant resources each year on programs that impact tourism, there is currently no overarching Federal coordination of travel and tourism policies and programs. Since the closing of the U.S. Travel and Tourism Administration in 1996, Federal agencies have not undertaken a coordinated approach to promoting tourism destinations, facilitating travel for visitors, or providing visitors with a quality experience. As a result, agencies have acted individually, and sometimes in partnership, to address pressing issues related to travel and tourism.

In addition to individual Federal agencies, other Federal and non-Federal entities contribute to priority-setting on matters related to travel and tourism. The Tourism Policy Council (TPC), established by Congress to coordinate Federal policies and programs affecting travel and tourism, has played a varied role over the years and has proven effective when afforded sufficiently high-level leadership. The U.S. Travel and Tourism Advisory Board and industry associations play a key role by informing Federal agencies about issues of importance to the private sector. Brand USA markets travel to the United States to overseas audiences. As Brand USA expands its activities, coordination between Federal agencies and Brand USA will be important.

### *Conducting Research and Measuring Results*

Timely and useful data are integral to the successful branding, marketing, and sustainability of the United States as a visitor destination. While the Department of Commerce is able to provide international visitation estimates for most states, territories, and major cities, that information often does not cover less-traveled destinations. Metrics will need to be developed to evaluate progress on goals delineated in this National Strategy.

---

<sup>41</sup> Several of these tools, funded by High Growth Training grants, are available at <https://wfsolutions.workforce3one.org/> by selecting “Hospitality” under “Industry.”

<sup>42</sup> 29 U.S.C. 2801 et. seq.

### III. PROMOTING THE UNITED STATES

**Goal: Increase U.S. travel and tourism exports and encourage Americans to travel within the United States and its territories.**

When foreign nationals visit the United States the good and services they purchase are exports. Exports of goods and services in connection with the travel and tourism industry totaled \$153 billion in 2011, accounting for 25 percent of services exports.<sup>43</sup>

Increasing travel and tourism to and within the United States, requires fostering additional demand for the product and providing travelers the information and resources they need to plan and execute their trips. The Federal government plays a unique and essential role in promoting the American tourism product to potential travelers. Federal employees manage iconic destinations, facilitate and regulate travel systems, implement programs and policies that impact the travel and hospitality industry, monitor and regulate passage across our borders, and directly serve visitors at federally owned and managed tourist attractions. The depth and breadth of Federal engagement in travel and tourism confers on the Federal government a special opportunity to communicate with potential visitors using a consistent marketing message and a broad spectrum of media.

The Federal role in promoting tourism is distinct and additive to that of Brand USA, which promotes travel and tourism to the United States by international visitors and assists the Federal government in communicating travel requirements and policies. The Federal government can supplement Brand USA's efforts by using its authority, messengers, and outlets to communicate the wealth of opportunities available to potential visitors and also how to plan a visit to our country.

Overseas travelers to the United States who visit national parks or tribal lands tend to stay longer in the United States, to visit more destinations within the country, and are more likely to be repeat visitors to the United States.<sup>44</sup> As the manager of many of these destinations, the Federal government is in a unique position to reach these high-value customers.

The Federal government is also well positioned to provide information about our laws and policies governing travel to the country. The perception that acquiring a U.S. visa is difficult is a barrier to increased travel and tourism, particularly in certain key growth markets where visitors may require U.S. visas. To combat misperceptions, the public and private sectors must work together to provide timely, engaging, and accurate information on the visa application process for both new and returning travelers.

---

<sup>43</sup> ITA, OTTI, Fast Facts: United States Travel and Tourism Industry, 2011, available at [http://tinet.ita.doc.gov/outreachpages/download\\_data\\_table/Fast\\_Facts.pdf](http://tinet.ita.doc.gov/outreachpages/download_data_table/Fast_Facts.pdf).

<sup>44</sup> Department of Commerce, ITA, OTTI, International Travel to the United States: Focus on National Parks & American Indian - Alaska Native Tourism, March 2011 available at <http://www.nationalparksonline.org/wp-content/uploads/2011/01/OTTI-International-Travel-to-Native-American-Destinations.pdf>.

## United States National Travel and Tourism Strategy

Once potential travelers have embraced the idea of traveling to and within the United States, they need access to information on how to execute their trips. Although the sale and marketing of travel goods and services is largely the domain of the private sector (e.g., travel agents, hotels, and airlines), the public sector (e.g., recreation.gov and state and local tourism offices) plays an important role in communicating the diversity of travel experiences available in the United States. There are significant opportunities for new and existing public-private partnerships to amplify positive messaging and to realize synergies in our existing resource constrained environment. There is also significant room for improvement on the Federal websites that provide trip planning resources to the general public.

The scope of Federal efforts to promote the United States as a destination and help visitors plan their travel should be broad. Promotional efforts should highlight a wide variety of destinations that would entice visitors to extend their stays, from the well-known to those off the beaten path, near major metropolitan centers and in rural areas, in the continental United States as well as in Alaska, Hawaii, and the territories. A number of Federal agencies can leverage existing programs and assets for promotion, including, for example the America's Byways® program, which showcases 150 distinct roadways that have significant historical, cultural, recreational, natural, archeological, and scenic beauty and provides themed and special interest itineraries. Amtrak also offers promotions and contests to showcase destinations, including national parks that are accessible by train.

### **Strategy 1: Provide a Welcoming Entry Experience to Foreign Visitors**

Communicate through U.S. government officials and programs that the United States wants and welcomes international visitors.

- Welcome visitors and provide accurate information about the ease of legitimate travel to and within the United States. Actively encourage visitors to come to the United States by communicating a welcoming message and highlighting improvements in travel facilitation.
- Engage government spokespersons. Engage officials at the highest levels of the Federal government, including the President of the United States and ambassadors, to communicate that the United States wants visitors, and provide accurate information, a welcoming message and an invitation to visit.

### **Strategy 2: Coordinate with Brand USA and Leverage Partnerships**

Coordinate with Brand USA in its mission to promote international travel to the United States. Engage in public-private partnerships and partnerships with state, local, tribal, and territorial governments to provide promotional content and in-kind support, as well as to leverage resources for international and domestic marketing efforts.

- Coordinate with Brand USA. Coordinate Federal promotion efforts with Brand USA's marketing campaign, which will target our neighbors, Canada and Mexico; visa waiver countries, including Australia, France, Germany, Japan, South Korea, and the United Kingdom; and fast-growing economies such as Brazil, China, and India. Provide information to Brand USA in support of its marketing and communication programs and activities.
- Partner with private sector entities. Coordinate promotional efforts with the travel and tourism industry. Use new and existing agreements to conduct joint promotions that match the unique assets and messengers of the Federal government with the resources and expertise of travel and tourism businesses.

## United States National Travel and Tourism Strategy

- Partner with state, local, tribal, and territorial governments. Join non-Federal tourism authorities in place-based and activity-based promotional campaigns. Provide grants and technical assistance to qualified public sector entities to support their efforts to attract and serve additional visitors.

### **Strategy 3: Enhance Federal Promotional Efforts**

Attract new international visitors, particularly from visa waiver countries and from fast-growing economies like Brazil and China, and our neighbors, Canada and Mexico, as well as encourage more Americans to vacation within the United States.

- Coordinate interagency promotion. Establish a unified Federal promotion effort in the international marketplace to encourage travel and tourism. Coordinate agency promotional efforts and use personnel and programs to amplify the message. Coordinate travel policy communications as well as marketing messages and programs, including tradeshow, familiarization tours, itineraries, and materials.
- Provide information about the destinations we manage. Increase exposure by travelers and potential tourists to travel and tourism promotion materials for federally-managed destinations. Cross promote American cities, parks, museums, and other points of interest. Develop and promote itineraries designed to appeal to visitors with interest in certain subjects, activities, historic events, or anchored by well-known and popular destinations.

### **Strategy 4: Provide User-Friendly Planning Tools and Resources**

Provide coordinated trip-planning information for end users, as well as portable data that partners can use to develop their own travel planning tools.

- Update data. Ensure data on federally-managed websites is comprehensive, reliable, and accessible to individual visitors and to application and program developers. Fully utilize existing databases to connect potential visitors with the range of sites, experiences, and resources available to travelers.
- Improve tools. Standardize and improve trip planning sites operated by Federal agencies such as [www.recreation.gov](http://www.recreation.gov) and [www.amtraktoparks.com](http://www.amtraktoparks.com). Use pilots to explore cost-effective options for providing planning materials and tools in multiple languages.
- Identify future opportunities. Use market research conducted by Brand USA and the Department of Commerce to analyze the demand among potential travelers for new or improved trip planning tools. Develop focused plans for development of new tools based on this analysis.

## **IV. ENABLING AND ENHANCING TRAVEL AND TOURISM TO AND WITHIN THE UNITED STATES**

**Goal: Reduce barriers to trade and make it safer and more efficient for visitors to enter and travel within the United States and its territories.**

The Federal government plays a primary role in addressing institutional barriers to international trade, including those impacting the travel and tourism industry. While travel and tourism is among the most liberalized sectors, some barriers to trade in travel and tourism services remain. For example, restrictions on airline entry, service levels, and the cities that can be served; the sale of outbound travel and packaged group travel; the use of enabling technologies; and the nationality of tour operators. To support growth in trade in the travel and tourism industry, the

## United States National Travel and Tourism Strategy

Federal government should expand its efforts at working with foreign governments to identify and lower barriers to trade in travel services, including working towards incremental liberalization of aviation services and additional open-skies agreements and exploring cooperation agreements to increase travel flows.

The government is responsible for safeguarding the country from security threats while efficiently processing all persons seeking to travel to the United States. The Federal government strives to provide all qualified visa applicants with an experience that promotes a positive image of the United States without compromising security. To achieve this, the Department of State has increased staffing, expanded facilities, improved efficiency, extended visa interviewing hours at our busiest posts, adopted streamlined application processes for many leisure and business travelers who previously qualified for visas, and is implementing a Global Support Strategy (GSS).<sup>45</sup> GSS frees up consular staff time and facilities for interviews by shifting non-adjudication services out of our visa waiting rooms. In high-volume locations such as Mexico and Brazil, GSS provides off-site biometric (fingerprint and photograph) collection, freeing up window space for interviews at our embassies and consulates. In lower-volume locations, GSS provides consistent support services, including management and reporting tools that can be accessed by consular sections and in Washington, which allows embassies and consulates to better manage interview appointments and backlogs. By May 2012, 59 percent of the world will be covered by GSS.

The government can apply the lessons learned from the sharp rise in demand for visa services in China and Brazil to other instances where anticipated economic growth will spur significant demand for nonimmigrant visa services. New policies and initiatives designed to provide qualified visa applicants with a positive experience, without compromising border security, will enable the government to keep pace with the expected growth in demand for visas.

The Federal officers who secure our nation's borders while facilitating the movement of legitimate travel and trade through our ports of entry have a unique opportunity to create a positive first impression of the United States, while maintaining the highest standards of security. The government is working to improve the arrival experience for passengers traveling to the United States through training, processing enhancements, automation, wait times measurement and posting, and the use of innovative technology. For example, the Federal government has established the Model Ports program to pilot best practices for creating a welcoming atmosphere in our country's 20 busiest ports of entry, which receive 73 percent of air travelers to the United States. A traveler satisfaction survey at the Model Ports was deployed in November 2011 to assess passenger satisfaction at the Model Ports. The results were released in early May 2012. Nearly 90 percent of travelers surveyed agreed that CBP officers were welcoming and that their processing time was either short or reasonable.<sup>46</sup>

---

<sup>45</sup> GSS replaces the current patchwork of contractor provided visa support services at embassies and consulates (e.g., call centers, appointment scheduling, and document delivery) with a single contract and comprehensive process for managing the logistical arrangements that precede the actual adjudication process, allowing the Department of State's Consular Affairs to increase per-officer visa adjudications without adding staff.

<sup>46</sup> "International Traveler Satisfaction Overview" U.S. Customs and Border Protection, May 2, 2012, available at [http://www.cbp.gov/xp/cgov/travel/customerservice/mp\\_welcome/intl\\_travel\\_survey.xml](http://www.cbp.gov/xp/cgov/travel/customerservice/mp_welcome/intl_travel_survey.xml).



Through the introduction of risk-based security programs and policies, and by leveraging the latest technologies and intelligence, the Federal government can focus its efforts on those passengers who are unknown or who are higher risk, thereby enhancing the travel experience for known and trusted travelers. Passenger processing involves many layers, both seen and unseen, and the Federal government has developed partnerships with local airport authorities, airlines, and the private sector to continuously assess and resolve challenges in aviation security operations. One way to streamline passenger processing and reduce wait times is to process expeditiously low-risk travelers, which frees resources to focus on remaining travelers. For example, the TSA's new expedited screening initiative, TSA Pre✓™ allows TSA to focus more attention on travelers about whom we know less, while providing expedited screening, and perhaps a better travel experience, for those travelers about whom we know more. In order to prevent potential terrorists from exploiting the system, TSA will always incorporate random and unpredictable security measures throughout the airport and no individual will be guaranteed expedited screening. Another example of a risk-based security program is CBP's Global Entry program, an effort through which qualified travelers provide more information to enroll, thereby allowing CBP officers to focus resources on screening other passengers.

A safe and reliable domestic transportation infrastructure allows U.S. citizens to travel within our country and connects international visitors to the many wonderful destinations located away from major ports of entry. To accommodate growing demand by domestic and international travelers, our transportation infrastructure must provide consistent and dependable service, minimize cost and energy consumption, and be safe, efficient, environmentally friendly, and resilient. In support of these objectives, the Department of Transportation has helped fund a number of initiatives, including infrastructure projects at key land border crossings and an ongoing effort to upgrade our air travel system to FAA's NextGen satellite-based technology. NextGen will yield improvements in safety, fuel economy and on-time performance, resulting in millions of dollars in expected savings through efficiency by the year 2020.<sup>47</sup>

As the nation expands opportunities for travel and tourism, and energy prices potentially increase, pedestrian, multimodal, and mass-transit options will become even more important for travel and tourism. Federal grant programs and discretionary funds support the development of pedestrian and bicycle networks, streetcars, airport-downtown rail extensions, alternative transportation, and enhanced multimodal connections in cities and towns, on Federal and tribal lands and America's Byways®. Infrastructure improvements directed at local residents and commuters, as well as those that provide access to rural areas, also enable travelers to visit less-prominent areas and to utilize alternative transportation modes.

### **Strategy 1: Lower Barriers to Trade in Travel Services and Increase Travel Flows**

- Continue aviation liberalization. Continue open-skies outreach to additional aviation partners beyond our current 105 open-skies partners, including working towards open-skies agreements / incremental liberalization with key remaining countries.

---

<sup>47</sup> Federal Aviation Administration, NextGen Implementation Plan, March 2012, available at [http://www.faa.gov/nextgen/implementation/media/NextGen\\_Implementation\\_Plan\\_2012.pdf](http://www.faa.gov/nextgen/implementation/media/NextGen_Implementation_Plan_2012.pdf).

## United States National Travel and Tourism Strategy

- Identify and address impediments to growth in key markets. Coordinate with the private sector to identify and address challenges to the free flow of trade in travel and tourism services.
- Engage with international partners. Enter into cooperative agreements with governments in key markets to expand security cooperation and facilitate travel flows.

### Strategy 2: Streamline the Visa Application Process

- Implement recommendations contained in the report of the Departments of State and Homeland Security to the President. In response to the President's call for innovative strategies to welcome more visitors to the United States without compromising border security, the Departments of State and Homeland Security submitted a report to the President in March 2012 outlining ways to further streamline visa and foreign visitor processing. Portions of this plan are summarized below.
  - Increase staffing capacity at the highest priority posts. Reallocate resources to provide temporary support to visa adjudicating posts in Brazil and China; double the number of visa adjudicating positions in Brazil and China by the end of FY 2012; and increase the number of consular adjudicators with Portuguese and Chinese language ability.
  - Explore and implement internal programs to increase efficiency. Expand interviewing hours in China and Brazil; implement the Global Support Strategy (GSS) in Brazil; prepare to implement parts of the GSS in China; continue to refine GSS action plans to manage increases in demand over the long term; and incorporate visitor arrival projection data into visa demand projections for planning capacity improvements.
  - Pursue streamlined programs for low-risk applicants. Allow certain categories of low-risk travelers to renew visas without interviews for up to four years after the prior visa's expiration, where the consular officer deems it appropriate; and waive interviews for qualified Brazilian nationals under age 16 and 66 years of age and older.
  - Expand existing facilities and consider additional visa-processing facilities in China and Brazil. Continue expansion projects in China and Brazil, including the opening of two new consulates in Brazil and expanding our presence in Wuhan, China.
  - Increase efforts to expand the Visa Waiver Program and travel by nationals of VWP countries. Continue to work with international partners such as Taiwan to meet VWP eligibility requirement; support congressional efforts that seek to appropriately and securely expand VWP; and support interagency efforts to increase travel by nationals of VWP countries.
- Leverage private and Federal channels to educate foreign publics. Explore the possibilities for public-private partnerships with Brand USA and other travel and tourism private sector stakeholders to create materials to provide timely, engaging, and accurate information on the visa application process to potential visitors and continue consular staff outreach programs with host country nationals.

### Strategy 3: Improve Customer Service at Ports of Entry

- Expand trusted traveler enrollment. Increase enrollment in NEXUS, SENTRI, and Global Entry, which frees CBP resources to manage other travelers. Continue to work with external partners to expand trusted traveler programs.
- Deploy technology. Continue deployment of advanced technology at land borders to facilitate efficient processing and complete the deployment of Ready Lanes for travelers with

RFID-enabled documents, LED Signage, and AM radio transmitters. Deploy, subject to funding availability, additional pedestrian Ready Lane kiosks. Increase the use of RFID-enabled travel documents to significantly reduce inspection time at the northern and southwest land borders to improve processing capacity and accuracy of identity verification, as well as reduce wait times.

- Re-engineer processes. Improve the way processing takes place in all inspection environments, and make continual assessments for process improvement. New technology, as well as improved programming and policies, such as initiatives that allow travelers to move more quickly through screening areas or prioritize passengers with urgent connections, can be developed, where port facilities allow, to enhance efficient and secure processing.
- Prioritize customer service. Work internally to continue to maximize available resources to achieve greater efficiency while improving the overall traveler experience. Continue to make customer service at the ports of entry a priority, using the results of traveler satisfaction surveys and other data.
- Leverage partnerships. Develop and use partnerships with airlines, airports, travel and tourism industry representatives, and other travel stakeholders to continuously assess and tackle shared challenges and opportunities.

### Strategy 4: Enhance Airport Screening

- Expand expedited screening initiative. Expand TSA Pre✓™ to additional airlines, airports, and populations of known travelers. By the end of 2012, TSA plans to have TSA Pre✓™ operating at many of the nation's busiest airports.
- Develop and use risk-based approach. Focus resources and improve the passenger experience at security checkpoints by applying new intelligence-driven, risk-based screening procedures and enhancing use of technology. Strengthen partnership and communication with the travel and tourism industry, the traveling public and other key stakeholders to better develop, implement, and assess new initiatives, programs, and technologies.

### Strategy 5: Maintain and Improve Transportation Infrastructure

- Initiate pilot aviation cooperation program. Expand the Department of Transportation's work with the European Union and China to implement the recommendations of the Secretary of Transportation's Future of Aviation Advisory Committee, which support the development of air transportation service options to and from the United States.
- Invest in infrastructure. Continue efforts to improve transportation and Land Port of Entry infrastructure related to U.S.-Canada and U.S.-Mexico border crossings. Implement on-going and new, as budget allows, U.S.-Canada and U.S.-Mexico border crossing infrastructure projects, including projects to improve inspection plazas, roads, bridges, tunnels, and ferries.
- Update air systems and infrastructure. Improve the condition of the nation's air transportation infrastructure through implementation of NextGen and other programs. Support the International Civil Aviation Organization's (ICAO) efforts to reduce barriers to international air travel and to maintain the efficient functioning of the international aviation system, including harmonization of NextGen, as well as efforts to enhance international security standards.
- Connect visitors to iconic and off-the-beaten-path destinations. Enable travelers to see America's special places that are off the beaten path through programs that increase access and awareness, such as America's Byways®, the Federal Lands Highway Program, the Transit in Parks Program, and the Recreation Trails Program, and increase the availability of multimodal mass-transit options to these destinations.

**V. PROVIDING WORLD-CLASS CUSTOMER SERVICE AND VISITOR EXPERIENCE**

**Goal: Provide a high-quality visitor experience for U.S. and international visitors to achieve high customer satisfaction and inspire repeat visits.**

The Federal government can use its resources to ensure that we meet a high standard of customer service and provide memorable visitor experiences that will generate new and repeat visitation. In the most direct manner, we have the opportunity at our federally-managed sites to actually serve as hosts to our guests. The Federal government also influences the service provided by travel and hospitality businesses by offering incentives and programs to help train the private workforce, and by providing special assistance to small businesses in the sector.

When travelers visit a federally-managed site – such as a national park, refuge, marine sanctuary, or forest – the U.S. government gains a unique opportunity to create an unforgettable experience. The reputation of our staff at our sites is stellar; park rangers are among America’s most recognizable and beloved public figures. From guided hikes to emergency response, the Federal servants who interact with the public are on the front lines of the customer service experience. The challenge for Federal agencies is to provide information and services to a wide variety of visitors from across the country and the world. Successful visitor services at America’s destinations utilize up-to-date research about visitor behavior and preferences to facilitate a positive experience by providing services, assistance, information, educational opportunities, and advice, but also the space and freedom to allow visitors the opportunity to discover and be inspired.

Certain challenges at times threaten the ability of Federal agencies to deliver on this promise. A mismatch between visitor volume and service capacity can be difficult to navigate. The diversity of visitors – in terms of language, age, and interests – adds to this challenge. Many units are limited in the use of new media to communicate with visitors, and are less able to serve diverse visitors using a static inventory of paper maps and brochures. Isolation is another challenge; visitors would benefit from greater collaboration among Federal units and gateway communities to design and cross-promote complimentary experiences and itineraries. Visitation must also be managed responsibly to avoid degrading the world-class resources visitors expect to see and experience. Many national parks and Federal lands and waters are in rural areas. Increasing both international and domestic travel to Federal lands and surrounding small towns can help stimulate the economy and create jobs in rural America.

At all tourist destinations, whether managed by the Federal government or the private sector, the quality of a visitor’s experience depends largely on the “front line” customer-facing workers who engage tourists from arrival to departure. A skilled tourism and hospitality workforce is therefore essential to a robust travel and tourism industry. The Federal government can and has played an important role in supporting the private sector’s efforts to ensure that workers in the travel and tourism industry are skilled and competent to do the job.

## United States National Travel and Tourism Strategy

The Federal government creates opportunities for workforce development efforts through the Workforce Investment Act (WIA).<sup>48</sup> In FY 2012, \$4.8 billion was appropriated under Title I of WIA for job training and employment services to adults, displaced workers, and disadvantaged young people across all industry sectors. WIA funds are administered in all 50 states and U.S. territories by state and local workforce investment boards. Strong industry and business partnerships with workforce investment boards are an important means through which Federal investment supports a skilled travel and tourism workforce.

The travel and tourism industry varies greatly by locality and workers are needed in a wide range of sectors including lodging, food service, transportation, recreation, and arts and entertainment. A top-down approach to workforce development is, therefore, unlikely to succeed. Our experience shows that the most successful strategy is for state and local workforce investment boards to work closely with existing tourism boards and local leaders in education, labor, and community organizations to examine workforce needs and develop plans to meet them. For example, the Napa Valley, California, workforce investment board sponsored a comprehensive hospitality and tourism workforce gap analysis with several local partners, leading to recommendations ranging from combating misperceptions about hospitality careers to postsecondary vocational training and skill-based certifications.

Federal tools such as online collaborative workspaces and competency models have also been widely utilized to promote this kind of dialogue at the local level, helping to focus the agenda for all stakeholders. Competency models are defined sets of skills and abilities required to perform most common entry-level jobs in an identified sector. The models are created through a process sponsored by the Department of Labor and ratified by industry leaders. Secondary and post-secondary schools can then develop certificate programs designed to teach these skills and employers can accept the certificates from these programs as evidence of work readiness.

Federal information resources, like the dedicated hospitality industry page at [www.workforce3one.org](http://www.workforce3one.org), assist workforce professionals, employers, and educators in sharing knowledge and tools to support the employment needs of the industry. Using these tools and resources, local and regional partnerships can produce the workforce needed to support a healthy travel and tourism economy and provide travelers a high-quality visitor experience.

The estimated 28 million small businesses in America, representing more than 99 percent of all firms and employing half of the private sector workforce, create two of three net new American jobs.<sup>49</sup> In the travel and tourism industry, these businesses include travel agencies, tour operators, convention and visitors bureaus, casinos, lodging providers, Federal concessionaires, outfitters, and guides. Through the Small Business Administration, the Federal government helps these businesses grow and provide high quality goods and services to their customers. SBA grants and programs, and its partnerships with states, municipalities, and industry and trade associations, help businesses create business plans, conduct financial and auditing analysis and build marketing strategies, among other things.

---

<sup>48</sup> 29 U.S.C. 2801 et. seq.

<sup>49</sup> “Frequently Asked Questions About Small Business,” Office of Advocacy, U.S. Small Business Administration, January 2011, available at: <http://www.sba.gov/sites/default/files/sbfaq.pdf>.

### Strategy 1: Improve Visitor Services at Federally-Managed Sites

Exceed visitor expectations for service and information, provide information about available experiences including lesser-known destinations, facilitate visitation via cross-promotion and collaboration, and cater to a wide variety of visitors.

- Showcase the American experience. Develop additional tourism circuits near top destinations to encourage travelers to expand their itineraries to lesser-known destinations, to benefit gateway communities and add valuable vacation days. Existing pilot efforts include:
  - **Las Vegas:** Las Vegas is one of the top destinations in the United States for international travelers. By working with tour companies and other vendors, we can market itineraries that entice visitors to venture out of the city and explore the spectacular surrounding natural areas such as Red Rock Canyon National Conservation Area, Spring Mountains National Recreation Area, Grand Canyon National Park, Lake Mead National Recreation Area, Death Valley National Park, and Zion National Park.
  - **Miami:** Miami is one of the biggest destinations in the United States for South American tourists. Suggested itineraries for these travelers include opportunities to explore the “original Miami” through the sawgrass of Everglades National Park and wildlife and beaches beyond the city in Crocodile Lake National Wildlife Refuge, Biscayne National Park, and Florida Keys National Marine Sanctuary.
  - **San Francisco:** Visitors to the City by the Bay already flock to the Golden Gate Bridge, but just beyond the bridge awaits the world’s tallest trees at Muir Woods National Monument, the Pacific Flyway with hundreds of bird species at Don Edwards San Francisco Bay Wildlife Refuge, one of the most beautiful shorelines in California at Point Reyes National Seashore, and myriad marine mammals at Gulf of the Farallones National Marine Sanctuary. Also of interest are the national historic and scenic trails in the Eldorado National Forest and the Lake Tahoe Basin Management Unit.
- Serve diverse audiences. Provide information and interpretation in plain English and foreign languages. Create volunteer “ambassadors” at popular parks and monuments to provide a more personalized experience for international travelers. Expand the use of new technology and new media to provide customized visitor information for different cultures, ages, languages and interests, and to decrease the demands on staff at overburdened sites and times.
- Improve access. Complete strategic road upgrades and reconstruction, public transit development and multi-modal connections, land and easement acquisition, and improved access to information about opportunities for recreational, historical, and cultural experiences. Streamline permitting processes for camping or outfitting in similar geographic locations.
- Promote regional tourism. Develop community-based tourism collaborations in key strategic destination markets, especially those with scenic byways, coastal resources, national scenic and historic trails, wild and scenic rivers, and other natural and cultural attractions. Partner with local communities and engage with tribes to promote tourism and provide cultural experiences where welcomed and in a manner sensitive to cultural traditions and beneficial to the communities visited.



**Strategy 2: Foster a Skilled Hospitality and Tourism Industry Workforce**

- Utilize competency models. Engage with industry leaders to amplify the existing hospitality industry competency model, and to develop appropriate new competency models related to the travel and tourism industry. Identify cross-sector and unique competencies required for car rental agencies, tour operators, e-travel site operators, and other travel and tourism sectors.
- Partner with the private sector. Encourage workforce investment boards to strengthen partnerships with travel and tourism businesses and convene the business community in their respective regional markets to assess workforce issues. Cross-train private sector hospitality and Federal recreation and visitor services workforces through collaborative curriculum development and delivery.
- Create space to collaborate. Assist workforce professionals, employers, and educators in sharing knowledge and tools to support the employment needs of the industry. Use technology and new media to foster information sharing, dialogue and partnership.
- Promote the Summer Jobs+ Initiative. Target tourism-related businesses to join the 2012 effort to provide 250,000 youth with summer job experiences, including paid positions, internships, and mentoring/shadowing opportunities.

**Strategy 3: Support Small Business in Travel and Tourism**

Develop and coordinate a targeted approach at the Federal level to support small- and medium-sized travel and tourism businesses.

- Expand outreach and education. Use Federal websites, email and social media to educate small businesses on how they can prepare for, and make the most of, the upcoming tourist season. Provide entrepreneurs with the information needed to start a travel and tourism business, including key business opportunities in in-demand travel sectors, how to write a business plan, and information on how to access financing. Widely distribute information on Federal programs, from counseling to CAPLines, a credit program designed to help businesses cope with seasonality. Share content and seek options for deliberated, focused engagement with other Federal agencies and tourism promotion organizations, including Federal land and water managers and the American Indian Alaska Native Tourism Association (AIANTA).
- Promote existing small businesses. Partner with travel and tourism associations to increase awareness of the small businesses in their communities and encourage tour operators to include stops at local, small businesses.
- Create co-marketing campaigns. Develop co-marketing campaigns with those businesses that are licensed to provide recreation and tourism services on Federal lands, waters, and shores.
- Increase counseling and mentorship. Help small travel businesses gain the confidence to withstand seasonality and demand volatility so they can grow and hire. Develop a targeted plan to strengthen counseling opportunities for tourism small businesses through SBA's broad network of 1,000+ Small Business Development Centers (SBDCs) and Women Business Centers (WBCs). Utilize counselors and mentors to help build awareness of the tourism initiative in their respective locality.
- Expand access to capital. Work with SBA's 5,000 lending partners and more than 190 small business investment companies (SBICs) to specifically target outreach to travel and tourism small businesses, so they understand the various traditional and patient capital options SBA's partners offer.

## VI. COORDINATING ACROSS GOVERNMENT

**Goal: Prioritize and coordinate support for travel and tourism across the Federal government.**

Successful implementation of the National Travel and Tourism Strategy will require sustained, high-level commitment throughout Federal agencies, which in turn will depend on continued recognition of travel and tourism as a priority for the Federal government. Similarly, private sector participation in and evaluation of these policies, programs, and initiatives is critical to their success.

The United States does not have an entity that is recognized by industry and across the Federal government as the primary Federal policymaker on travel and tourism related matters. Rather these responsibilities have been dispersed across multiple agencies, including the Office of Travel and Tourism Industries in the International Trade Administration and the interagency Tourism Policy Council (TPC) chaired by the Secretary of Commerce. As a result, although the Federal government spends significant resources each year on programs that impact tourism, we have lacked a coordinating body to prioritize and develop a more favorable environment for travel and tourism.

In addition to better coordination within the Federal government, we need to better coordinate with the private sector and state, territorial, tribal, and local governments. In many cases, the private sector and these non-Federal government bodies have resources to promote their destinations both internationally and domestically. In addition, many state, territorial, tribal, and local governments have regulatory authorities and existing programs to promote tourism within their respective jurisdictions. Better communication and the dissemination of best practices throughout all levels of government and the private sector will strengthen tourism development across the country.

Agencies should focus resources in areas of common interest and emphasize linkages among resources and connections to a larger American story, such as with itineraries and geographic mapping efforts.

As demand for new and different experiences emerges, tribal, regional, state, territory, and local efforts can be encouraged and supported in partnership with the private sector, focusing on helping locations provide a quality experience, tell an authentic American story, and capitalize on the number of existing designations in the Federal arsenal, from America's Byways® to Preserve America. The United States has no shortage of compelling destinations available to promote, many of which are operated by the Federal government. These destinations are complemented by a variety of locations managed by tribal, state, territory and local governments, as well as the private sector.

The travel and tourism industry can be particularly challenged during market crises, which may result from natural disasters, pandemics, acts of terrorism, and other threats. Economies facing such crises often have difficulty assisting with the recovery of their local travel and tourism sectors. Federal assistance may be useful during these times, in particular to combat the negative perceptions of an area during and following the crisis. Internal coordination by Federal agencies

and with the private sector throughout the crisis and recovery phases may be critical to a prompt and full recovery.

### **Strategy 1: Emphasize Travel and Tourism as a U.S. Government Priority**

Institute a formal and inclusive leadership structure for travel and tourism within government and to coordinate with Federal agencies to effectively implement the National Travel and Tourism Strategy, consistent with Executive Order 13597.

- Reinvigorate the Tourism Policy Council. Commit to high-level representation by each member agency, organize working groups aligned with this National Travel and Tourism Strategy, and meet regularly to identify and address barriers to progress and coordinate efforts.
- Create a national travel and tourism office at the Department of Commerce. Serve as the primary point of contact for travel and tourism issues within the Federal government and at the national level, represent the United States on travel and tourism issues internationally, and provide day-to-day support needed to implement the National Travel and Tourism Strategy.
- Conduct outreach with public and private partners. Hold a summit on travel and tourism, and an annual travel and tourism event to foster communication among Federal agencies and leaders of state travel offices, destination management organizations, and trade associations.
- Study and implement best practices. Engage Federal agencies in dialogue with other countries on best practices in travel and tourism.

### **Strategy 2: Support Tourism Development**

Focus available resources on expanding the travel and tourism industry throughout the United States while ensuring that national and cultural resources are adequately protected and understood in the context of a uniquely American experience.

- Coordinate and publish datasets. Improve the presentation of data by providing effective geo-tourism information and map products across jurisdictions.
- Engage the public. Involve citizens as stewards and ambassadors in preserving, developing, promoting and managing tourism resources as a source of community pride and economic empowerment.

## **VII. CONDUCTING RESEARCH AND MEASURING RESULTS**

**Goal: Collect and analyze data to support decision-making in the public and private sectors and allow the Federal government to better measure the effectiveness of its efforts to increase travel and tourism.**

Product development, marketing strategies, investment plans, transportation planning, and competitiveness tracking all require good data and information. Data on visitors' origins, profiles, activities, motivators, states and cities visited, length of stay, and spending patterns can help with the successful branding, marketing, and sustainability of the United States as a visitor destination. Information on travel and tourism is the basis of sound policy and informs business decisions. Strategic planning for and performance measurement of the travel and tourism industry depends on the availability, validity, consistency, and reliability of statistics and information.

## United States National Travel and Tourism Strategy

The Department of Commerce is able to provide international visitation estimates for 20 states and cities based on the current sample size of the Survey of International Air Travelers (SIAT). The data does not effectively cover less-travelled destinations. Most states and cities do not have international research programs or a way to track volume and traveler characteristics data on their own. Data from two credit card companies is being used by select destinations to provide international traveler data, but with more than 50 percent of spending by international travelers transacted with cash, the use of credit card data has significant limitations.

Several longstanding issues hinder the collection of data, including tourism information required to be collected by the Travel Promotion Act (TPA):<sup>50</sup>

- Data on the international market currently is limited. The Department of Commerce's statistical system is built around the Survey of International Air Travelers (SIAT), which currently reaches a sample of only 0.2 percent. This is less than the 1 percent sample size mandated by the TPA. Commerce supplements the SIAT with data provided by the Department of Homeland Security and the Bureau of Economic Analysis, along with data from the Canadian and Mexican governments. The Department of Transportation has data on international arrivals and departures, but that information includes both U.S. citizens and international visitors and cannot be disaggregated.
- Domestic travel volume estimates and traveler characteristics data are not available. The Federal government's efforts related to in domestic travel and tourism research are focused on sector-specific types of research like national parks, arts and culture, and transportation.
- National level data exists for 25 sectors (e.g., lodging, restaurants, car rental, and transportation) but does not contain regional, state, or city impact estimates for domestic and international spending and employment.

### Strategy 1: Conduct Research

Work with the travel and tourism industry to collect and analyze data to support decision-making in the public and private sectors and allow the Federal government to better measure the effectiveness of its efforts to increase travel and tourism.

- Identify data needs. Develop an inventory of available research and identify existing data gaps.
- Partner to fill data gaps. Utilize available Federal and private sector research resources and work cooperatively with the private sector to address identified gaps. The Department of Commerce will seek to develop a public/private partnership program to support government research initiatives, strategic planning efforts and private sector promotion efforts.

---

<sup>50</sup> The Travel Promotion Act of 2009 (PL 111-145, 22 USC 2131) mandates the Department of Commerce from FY2011 to FY2015 to:

- Expand the number of inbound air travelers sampled by the Survey of International Air Travelers (SIAT);
- Revise the design and format of SIAT questionnaires;
- At least double the number of states and cities with reliable international visitor and export value estimates; and
- Improve market coverage.

## United States National Travel and Tourism Strategy

- Leverage data with other resources. Use secondary data including travel industry data, government data, credit card data, and aviation data.
- Collect, analyze and disseminate data. Work with the travel and tourism industry to collect, analyze and disseminate the data.
- Develop visitor information at Federal sites. Develop methodology to provide data to guide management of Federal sites that will help ensure visitor safety and satisfaction. As part of that methodology, collect data on visitor trip planning habits to inform Federal efforts to develop trip planning tools and resources.

### **Strategy 2: Monitor and Evaluate Results**

Develop metrics to evaluate progress on goals in this National Travel and Tourism Strategy.

- Develop metrics. Identify key performance metrics to measure progress of this National Travel and Tourism Strategy.
- Measure progress. Collect and analyze data and report progress on an annual basis.
- Analyze results to improve performance. Use metrics to identify issues needing corrective action.

## **VIII. CONCLUSION**

Travel and tourism is an important driver of the U.S. economy, with high potential to support job creation across the nation. In a globalized economy, travel and tourism policies affect a broad range of business interests, including those beyond the travel and tourism industry.

The President has elevated the promotion of travel and tourism as a top job creating priority for the United States government. In this spirit, we will implement this National Travel and Tourism Strategy and immediately begin developing detailed plans to realize the promise of the policies, actions, and recommendations contained herein. To ensure the full attention of agency leadership, the Tourism Policy Council will coordinate implementation of this National Strategy consistent with Executive Order 13597 and the creation of metrics against which to measure progress.

With the active participation of the highest levels of the Administration, agencies will coordinate efforts and work with private sector partners and State, local, tribal, and territorial governments in a collaborative effort to realize growth in the travel and tourism industry. These efforts will support economic opportunity and job creation in the United States.

## United States National Travel and Tourism Strategy

Goals and Strategies with Lead Agencies	
<b>Increase U.S. travel and tourism exports and encourage Americans to travel within the United States and its territories.</b>	
Provide a Welcoming Entry Experience to Foreign Visitors	State/Homeland Security/Commerce
Coordinate with Brand USA and Leverage Partnerships	Commerce
Enhance Federal Promotional Efforts	Commerce/Interior
Provide User-Friendly Planning Tools and Resources	Interior/Agriculture
<b>Reduce barriers to trade and make it safer and more efficient for visitors to enter and travel within the United States and its territories.</b>	
Lower Barriers to Trade in Travel Services and Increase Travel Flows	Commerce/USTR
Streamline the Visa Application Process	State/Homeland Security
Expand the Visa Waiver Program	Homeland Security/State
Improve Customer Service at Ports of Entry	Homeland Security
Enhance Airport Screening	Homeland Security
Maintain and Improve Transportation Infrastructure	Transportation
<b>Provide a high quality visitor experience for U.S. and international visitors to achieve high customer satisfaction and inspire repeat visits.</b>	
Improve Visitor Services at Federally-Managed Sites	Interior/Agriculture/ DOD-Army Corp/ Commerce-NOAA
Foster a Skilled Hospitality and Tourism Industry Workforce	Labor
Support Small Business in Travel and Tourism	SBA
<b>Prioritize and coordinate support for travel and tourism across the Federal government.</b>	
Emphasize Travel and Tourism as a U.S. Government Priority	Commerce/Interior
Support Tourism Development	Transportation/Interior
<b>Collect and analyze data to support decision-making in the public and private sectors and allow the Federal government to better measure the effectiveness of its efforts to increase travel and tourism.</b>	
Conduct Research	Commerce
Monitor and Evaluate Results	Commerce



